



CBO Mentor Project Monday Morning Letter
Class Update - #2

To: CBO Mentor Project Participants
Cohort #5 (as yet unnamed)

From: Francie Heim (and the team; Bill McGuire, Bill Gillaspie, Mary Turcotte)

Date: May 11, 2008

Two down and eight to go! Saturday was a grueling day covering school finance but no one overtly slept through the presentation, so I am grateful.

IMPORTANT REMINDERS
Monday Morning ZOOMERANG Survey - complete
Mentor discussion before next class (official list below)
Assignments for next class (official list below)

Congratulations to **Richard Sepulveda** for being the first person to know the entire class by first and last name and by district. Who will take up the challenge to be the SECOND class member to know the entire class by first and last names? Continue to work on your **Class Name**. The sooner you have your name, the sooner we can order your class shirts.

Friday night was an entertaining hour with **Sandy Silberstein**. She is one of the smartest people we know. Her background and experiences make her a fascinating observer and commentator on the political scene. I am sure you all went away with new insights on the forces at work behind this year's budget battle.

You got a chance to test your team building skills, with an exciting "**Pyramid Exercise**"! Each year the teams bring new strategies to this exercise and it is great fun to watch.

Bill McGuire entertained us with the Clovis Budget presentation. The question and answer period that followed was wonderfully entertaining. It was clear that you all did your homework. My favorite question however was the next morning, when our favorite Clover Unified kindergarten teacher questioned the seemingly random staffing patterns that resulted in significantly unequal class size loads. My guess is that Bill has been answering that question for some time and has yet to arrive at a satisfactory answer.

Saturday was a day of immersion into the intricacies of **school finance and revenue limit** funding. For those of you who were hearing this for the first time, it was undoubtedly an overwhelming amount of material to absorb. From watching the group, we think the

experts also learned some new things. The table “experts” were invaluable and our thanks to you for your support of the team throughout the day. And to those new to school finance, please use your table “expert” as a future resource as well as our instructors.

From our last session:

- a) Our **core business** is **TEACHING** and our **product** is **STUDENT LEARNING**.
- b) Now that you have seen a little more of the team, do our strengths start to show?

	Francie Heim	Bill McGuire	Bill Gillaspie	Mary Turcotte
1	Strategic	Includer	Empathy	Connectedness
2	Responsibility	Competition	Harmony	Consistency
3	Learner	Activator	Positivity	Empathy
4	Focus	Self-Assurance	Developer	Ideation
5	Woo	Ideation	Woo	Relator
Style	Competing Accomodating	Competing	Collaborating	Compromising

Below are your assignments.

MENTOR DISCUSSION TOPICS

Discuss with your mentor the topic of fiscal oversight (AB 1200) and their experiences in working with their county office. Bring a copy of your district 2nd interim approval letter from the county office.

Talk to your mentor about legal contracts and the most important lessons they have learned over the years relative to contracts.

JUNE Assignments

1. Income Topic – First DRAFT to your mentor for review by July 1.
Rewrites done by August 1 and submitted electronically to Francie for review and comments
2. User Friendly BUDGET. You received your CD. Start data collection now. Don't wait until the last minute. To be submitted by the October meeting.

3. Attend a board meeting in June where a budget is being presented. Be prepared to report out about the experience. (Your district, your mentor's district, or another district of your choice)
4. Leadership workbook assignment (from Bill McGuire). To be provided at the June session.
5. Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until September but if you want to get an early start – go for it!

Come prepared to talk (TWO MINUTES) about student achievement in your district. (from last meeting – you may still be called upon to discuss)

INCOME PAPER DETAILS – repeated from the last letter

Income Paper Assignment. Step 1 – Select Topic

Each class member selects an income source to research.

Examples

- | | |
|------------------------------|------------------------------|
| Class Size Reduction | Special Education |
| Transportation Funding | Food Service/Child Nutrition |
| Community Day School Funding | School Facilities funding |
| Adult Education | ROC/P |
| Charter Schools | Deferred Maintenance |

*not a complete list by any means– but some suggestions; you may choose another area of focus

Important:

Project **must** be approved by your mentor.

Guideline – You must be **CHALLENGED** by the research.

Not allowed: Dusting off an old report you gave to your board. Cutting and pasting from a School Services document. Picking a topic that is EASY, e.g. a Food Service Director selecting Child Nutrition or a Facility Director selecting Facility Funding.

- First DRAFT to your mentor for review by July 1.
- Rewrites done by August 1 and submitted electronically to Francie for review and comments.
- We will share the final documents with the class. Sample documents from a previous class will be shared.

OBJECTIVE OF THIS PROJECT:

In 10 classes, we cannot cover all the various areas and topics of school finance. However, your research will provide your **classmates with additional resources** to utilize. **Writing skills** are critical to being a successful CBO. This is an opportunity for you to get **feedback on your writing skills** from your mentor.

There is the additional importance of being sensitive to the language we use in communicating with our board, employees and our community. Do you sound like a **“Bean Counter”** or a **LEADER** dedicated to student success? We will ask your mentor to provide you input on how you come across in your communication and how you can improve.

Required Report Elements:

- As you describe how the program and funding work – keep in mind the following guidelines
 - Leadership – what is the CBO leadership role with regards to the funding/program?
 - People – identify the stakeholders
 - Systems – what are the systems that should be in place with regards to this funding source?
 - Resources – identify the resources, e.g., how the funding works
- Ed Code Citations
- Any other important considerations regarding the program
- Fiscal implications for your agency – e.g., if CSR funding, discuss encroachment
- Length of Report – One page executive summary, with at least three or more pages of additional detail
- Other elements that your mentor suggests would be relevant for the topic

WEBSITE RESOURCES THAT MAY BE HELPFUL:

- Legislative Analyst's Office (LAO: www.lao.ca.gov)
- Find Bills of Interest in the California Legislature (BILLS: www.leginfo.ca.gov/bilinfo.html)
- Search the California Code (CAL CODE: leginfo.public.ca.gov/calaw.html)
- Office of Public School Construction (OPSC: www.opsc.dgs.ca.gov)
- California Department of Education (CDE: www.cde.ca.gov)
- Fiscal Crisis & Management Assistance Team (FCMAT: www.fcmat.org)
- ED-DATA (ED-DATA: www.ed-data.k12.ca.us)
- School Services of California (SSC: www.sscal.com)
- Coalition for Adequate School Housing (C.A.S.H.: www.cashnet.org)
- California Association of School Business Officials (CASBO: www.casbo.org)
- Association of School Administrators (ACSA: www.acsa.org)
- California School Boards Association (CSBA: www.csba.org)
- CA County Superintendents Educational Services Association (CCSESA: www.ccsesa.org)

FUTURE MEETING SCHEDULE

April 4 & 5 2008
May 9 & 10
June 27 & 28
August 22 & 23
September 12 & 13
October 17 & 18
November 20,21,22 CBO Symposium
January 9 & 10 2009
February 6 & 7
March 6 & 7

Meeting Schedule .

You should have all the dates in your calendar. All of these are in Sacramento except the November class held in connection with the CASBO CBO symposium. More details to follow. The DRAFT schedule of classes for the year is in your introductory binder BUT we do modify topics and times throughout the year based on changing speaker needs or adjusting for time for specific topics. We will provide an update with each

“Monday Morning Letter”.

Dates won't change however.

	3	4	5
	June 27 & 28	August 22 & 23	September 12 & 13
2:00 to 4:00			
5:00 to 6:00	Working dinner - leadership problems	Working Dinner	Working Dinner
6:00 to 6:30	County office Fiscal Oversight (Wendy Benkert)	Financial reporting (Francie Heim)	Budget Development (Bill McGuire)
6:30 to 7:00			
7:00 to 7:30			
7:30 to 8:00	Fiscal Crisis-FCMAT perspective (Joel Montero)		
8:00 to 8:30			
8:30 to 9:00			
Saturday	Saturday	Saturday	
8:00 to 8:30	Leadership "21"	Financial reporting (Francie Heim)	Medical Benefits (Teri Ezaki)
8:30 TO 9:00			
9:00 to 9:30			
9:30 to 10:00	Legal issues & Contracts (Harold Freiman Lozano Smith)		
10:00 to 10:30			
10:30 to 11:00			
11:00 to 11:30			
11:30 to 12:00		Budget Development	
12:00 to 12:30	LUNCH	LUNCH	LUNCH
12:30 to 1:00		Financial reporting (Francie Heim)	Budget Development
1:00 to 1:30			
1:30 to 2:00	Accounting Basics/Financial Reporting (Francie)		
2:00 to 3:00			

CLASS STRENGTHS & STYLES

Strengths Finder 2.0 Results for CBO Cohort # 5

Last Name	First Name	Strength 1	Strength 2	Strength 3	Strength 4	Strength 5
Barnes	Leslie	Relator	Empathy	Strategic	Communication	Adaptability
Booth	Kassandra	Input	Context	Arranger	Individualization	Learner
Cabey	Shawn	Input	Learner	Achiever	Ideation	Activator
Cherniss	Alex	Competition	Command	Context	Significance	Maximizer
Craig	Aubrey	Achiever	Responsibility	Consistency	Learner	Belief
Cunnane	Kathy	Achiever	Responsibility	Deliberator	Relator	Learner
Deaton	John	Woo	Communication	Strategic	Responsibility	Restorative
DeGeyter	Julienne	Learner	Input	Intellection	Strategic	Achiever
Duldulao	Filipinas	Learner	Achiever	Arranger	Analytical	Consistency
Elia	Sam	Relator	Futuristic	Arranger	Deliberative	Restorative
Fagan	Richard	Analytical	Context	Individualization	Achiever	Adaptability
Flores	David	Responsibility	Achiever	Learner	Intellection	Relator
Fogerty	Michael	Context	Command	Analytical	Competition	Significance
Glaspey	Melody	Responsibility	Learner	Analytical	Achiever	Developer
Hawkins	Brian	Analytical	Responsibility	Ideation	Individualization	Strategic
Jorgensen	Steven	Achiever	Developer	Harmony	Empathy	Consistent
Kimmel	Karen	Analytical	Relator	Responsibility	Consistency	Discipline
Lantsberger	Scott	Relator	Deliberative	Achiever	Consistency	Learner
Manansala-Smith	Roslynne	Context	Learner	Achiever	Connectedness	Relator
McCoy	Mark	Strategic	Individualization	Learner	Achiever	Relator
Sepulveda	Richard	Learner	Responsibility	Ideation	Developer	Arranger
Statton	Christine	Strategic	Woo	Belief	Ideation	Includer
Trader	Jeffery	Context	Harmony	Arranger	Restorative	Developer
VanBuskirk	Peter	Achiever	Learner	Individualization	Strategic	Arranger
Ward	Steve	Responsibility	Learner	Ideation	Belief	Relator
Willis	Jason	Learner	Input	Achiever	Analytical	Responsibility

CLASS STRENGTHS & STYLES

Sort of Styles - TOP 3 Rankings			
Name	Style	Score	Ranking
Fogerty, Michael	Accomodating	8	1
Deaton, John	Accomodating	7	2
Manansala-Smith, Roslyne	Accomodating	10	2
McCoy, Mark	Accomodating	7	2
Statton, Christine	Accomodating	7	2
DeGeyter, Julienne	Accomodating	5	3
Sepulveda, Richard	Accomodating	6	3
Cunnane, Kathy	Avoiding	8	1
DeGeyter, Julienne	Avoiding	11	1
Glaspey, Melody	Avoiding	9	1
Jorgensen, Steven	Avoiding	9	1
Manansala-Smith, Roslyne	Avoiding	10	1
McCoy, Mark	Avoiding	7	1
Sepulveda, Richard	Avoiding	10	1
Kimmel, Karen	Avoiding	6	2
Booth, Kassandra	Avoiding	5	3
Craig, Aubrey	Avoiding	7	3
Duldulao, Filipinas	Avoiding	6	3
Elia, Sam	Avoiding	6	3
Fagan, Richard	Avoiding	7	3
Flores, David	Avoiding	7	3
Statton, Christine	Avoiding	6	3
Trader, Jeffery	Avoiding	7	3
VanBuskirk, Peter	Avoiding	6	3
Willis, Jason	Avoiding	6	3
Booth, Kassandra	Collaborating	10	1
Cabey, Shawn	Collaborating	8	1
Fagan, Richard	Collaborating	8	1
Flores, David	Collaborating	8	1
Trader, Jeffery	Collaborating	8	1
Ward, Steve	Collaborating	9	1
Cherniss, Alex	Collaborating	8	2
Craig, Aubrey	Collaborating	7	2
Cunnane, Kathy	Collaborating	7	2
Duldulao, Filipinas	Collaborating	7	2
Elia, Sam	Collaborating	9	2
VanBuskirk, Peter	Collaborating	6	2
Willis, Jason	Collaborating	6	2
Fogerty, Michael	Collaborating	7	3
Glaspey, Melody	Collaborating	6	3
Hawkins, Brian	Collaborating	6	3
Lantsberger, Scott	Collaborating	7	3
Craig, Aubrey	Competitor	8	1
Cabey, Shawn	Competitor	7	2
Fogerty, Michael	Competitor	7	2
Hawkins, Brian	Competitor	7	2
Lantsberger, Scott	Competitor	7	2
Cherniss, Alex	Competitor	7	3
Deaton, John	Competitor	5	3
Jorgensen, Steven	Competitor	6	3
Kimmel, Karen	Competitor	5	3
McCoy, Mark	Competitor	5	3
Ward, Steve	Competitor	5	3
Cherniss, Alex	Compromising	9	1
Deaton, John	Compromising	8	1
Duldulao, Filipinas	Compromising	11	1
Elia, Sam	Compromising	11	1
Hawkins, Brian	Compromising	8	1
Kimmel, Karen	Compromising	11	1
Lantsberger, Scott	Compromising	10	1
Statton, Christine	Compromising	11	1
VanBuskirk, Peter	Compromising	9	1
Willis, Jason	Compromising	9	1
Booth, Kassandra	Compromising	10	2
DeGeyter, Julienne	Compromising	8	2
Fagan, Richard	Compromising	7	2
Flores, David	Compromising	7	2
Glaspey, Melody	Compromising	8	2
Jorgensen, Steven	Compromising	8	2
Sepulveda, Richard	Compromising	9	2
Trader, Jeffery	Compromising	8	2
Ward, Steve	Compromising	8	2
Cabey, Shawn	Compromising	5	3
Cunnane, Kathy	Compromising	7	3
Manansala-Smith, Roslyne	Compromising	6	3